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ABSTRACT

Gerontologists and others working with the elderly have tended to treat them according to their chronological age. In order to compare retired professionals' perceived expectations of retirement with their subsequent realization, to discover possible discrepancies, and to examine the adequacy of current pre- and post-treatment counseling programs available for this population, 147 members of the Institute for Retired Professionals in New York City completed a questionnaire on retirement life. Analyses of results showed a high attainment of retirement expectations. However, few pre- or post-retirement counseling services were available for this professional group. The eight recommendations for action based on the findings include the establishment of peer counseling programs, health information services, seminars and course work for intellectual stimulation, and involving the retired professional in program development. (The nine page questionnaire is appended.) (MCF)

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"ARE THE NEEDS OF THE EDUCATED RETIREE BEING MET?"

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Research Brief
Western Gerontological Society
Albuquerque, N.M.
April, 1983

CG 017269

ABSTRACT: RETIREMENT AND THE PROFESSIONAL

Within the past fifteen years gerontologists and authorities working in the field of the elderly have generally treated the older person in terms of his/her chronological age. The heterogeneity of this older population (differences in background, training, life-styles, education, occupation, etc.) requires a more specialized approach to certain problems with which the older person must face immediately before and after retirement.

Current members of the Institute for Retired Professionals at the New School for Social Research in New York City were selected for the study representing the most recently joined retirees within the institute. A questionnaire was sent to 147 members who had joined in the years of 1979 and 1980. This group was selected because their experience as both pre-retirees and post-retirees yields a rich source of knowledge and information.

The Institute for Retired Professionals at the New School has served as a model for a number of universities offering life-long learning programs for retired professional people. Although most of the original members were from the teaching profession, its present membership of 630 people includes a wide range of professionals such as doctors, lawyers, dentists, artists, writers and business executives.

In order to compare the perceived expectations of retirement with their subsequent realization, and to discover whether discrepancies existed and to further discover whether current programs of pre-retirement and post-retirement counseling services were meeting the needs of this professional group, a questionnaire was designed and sent to 147 recently joined members. It yielded a 65% response.

The findings show a high attainment rate between expectations which were thought about while still working and their realization upon retirement. It was also discovered that there was very little being offered in terms of pre-retirement and post-retirement counseling and what was available was underutilized by this target population.

The study confirms the contention that pre-retirement and post retirement couseling services available to these professionals were not serving their needs. On the basis of this study, conclusions and recommendations are made regarding the types of programs which will serve the retired professional most effectively and the further research needed to develop such programs. A review of the existing research reveals the need for a more selective approach to this segment of the population, a group that will undoubtedly increase in size in the coming decades and will be characterized by even greater longevity and higher educational levels.

Barbara Aronson, New School for Social Research

Appendix I -- TABLES

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7 (chart)

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Questionnaire was sent to 147 IRP members who joined the Institute in 1979 and 1980.

Table 1. Sex Status

Sent to 147 IRP members

	total	Males	% response	Females	% response
total	147	43	30.*	104	71.*
Number responding	95	27	28.1*	68	72.*

* Percentages may not add up to 100 because of rounding.

Table 1 A - Response rate comparing male and female

MALE: 27 responding

	Total	Percentage responding to total male of 43
total	27	63.

FEMALE: 68 responding

	Total	Percentage responding to total females of 104
total	68	65.4

Table 2 Age Distribution at time of retirement

	total	Male	%	Female	%
total	95	27	100.	68	100.
under 55	1	0	0	1	1.5
55 - 60	15	4	14.8	11	16.2
61 - 65	34	8	29.6	26	38.2
66 - 70	34	11	40.7	23	33.8
70 +	11	4	14.8	7	10.3

Table 3. Marital Status

	total	Male	%	Female	%
total	95	27	100.	68	100.
single	9	1	3.7	8	11.8
married	39	17	62.9	22	32.4
widowed	37	7	25.9	30	44.1
separated/ divorced	10	2	7.4	8	11.8

Table 4. Former Occupation (at time of retirement)

	total	Male	%	Female	%
total	93	27	100.	66*	100.
business ex.	20	8	29.6	12	18.2
Educ/Teachers	38	9	33.3	29	44.
Public Serv. Adm.	13	2	7.4	11	17.
Professional	20	6	22.2	14	21.2
Self-Employed	2	2	7.4	0	0

* plus 2 females of unknown occupation

1. percentages may not add up to 100 because rounding.

Table 5. Reason for Retirement

	total	Male	%*	Female	%*
total	95	27	100.	68	100.
mandatory	15	1	3.7	14	20.5
voluntary	63	22	81.4	41	60.2
Health	11	4	14.8	7	10.2
other	6	0	0	6	9.

Table 6. Present Retirement Status

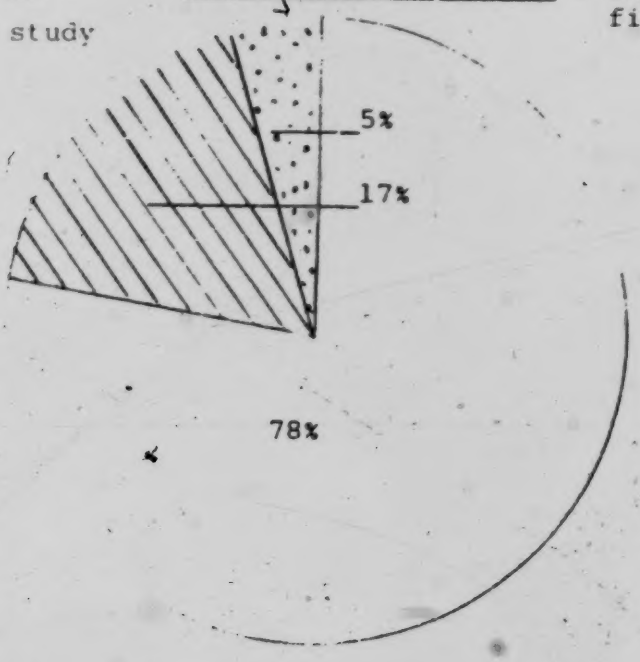
	total	Male	%*	Female	%*
total	95	27	100.	68	100.
Fully ret.	78	22	81.4	56	82.3
Semi-ret. (part time paid)	11	5	18.5	6	9.
Semi-ret. (part time vol. at least 12 hrs. wkly.)	4	0	0	4	6.
Other	2	0	0	2	3.

* Percentages may not add up to 100 because of rounding.

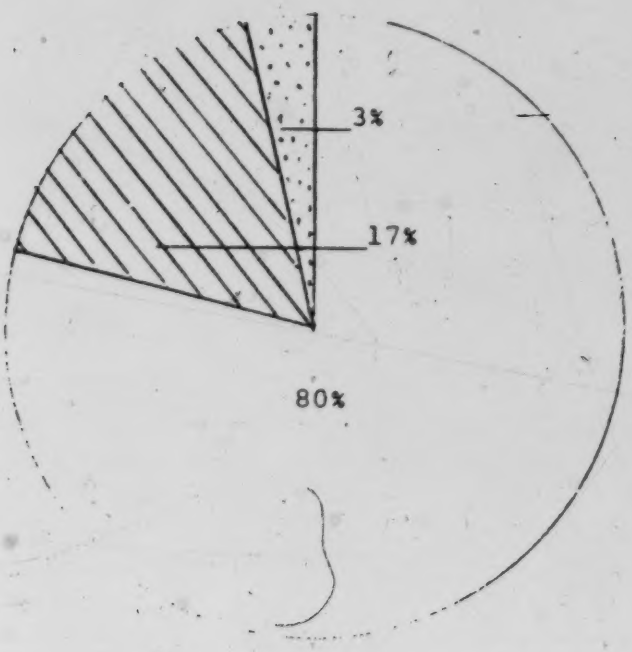
Chart 7

95 in study

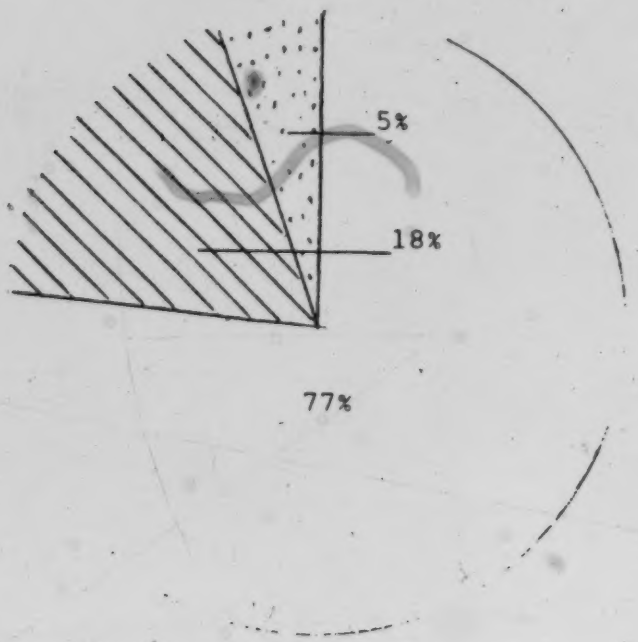
Total Male and Female - Expectations & Fulfillment



Male: 27 in study



Female: 68 in study



Expectations fulfilled

Expectations non-fulfilled

Fulfillment unknown

Note: Sections refer to expectations, not people

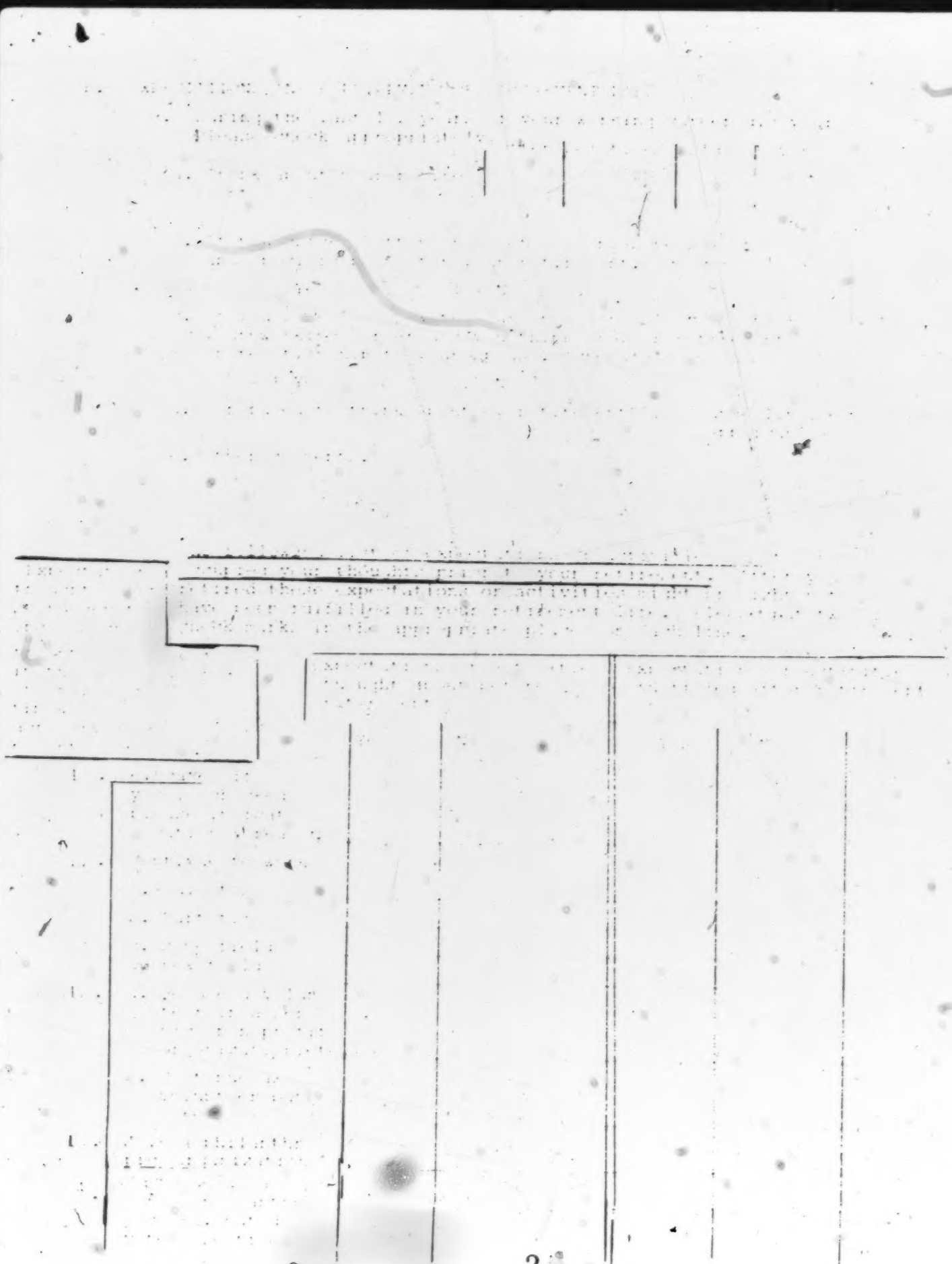
Table 8 As a retired Professional do you consider retirement counseling:

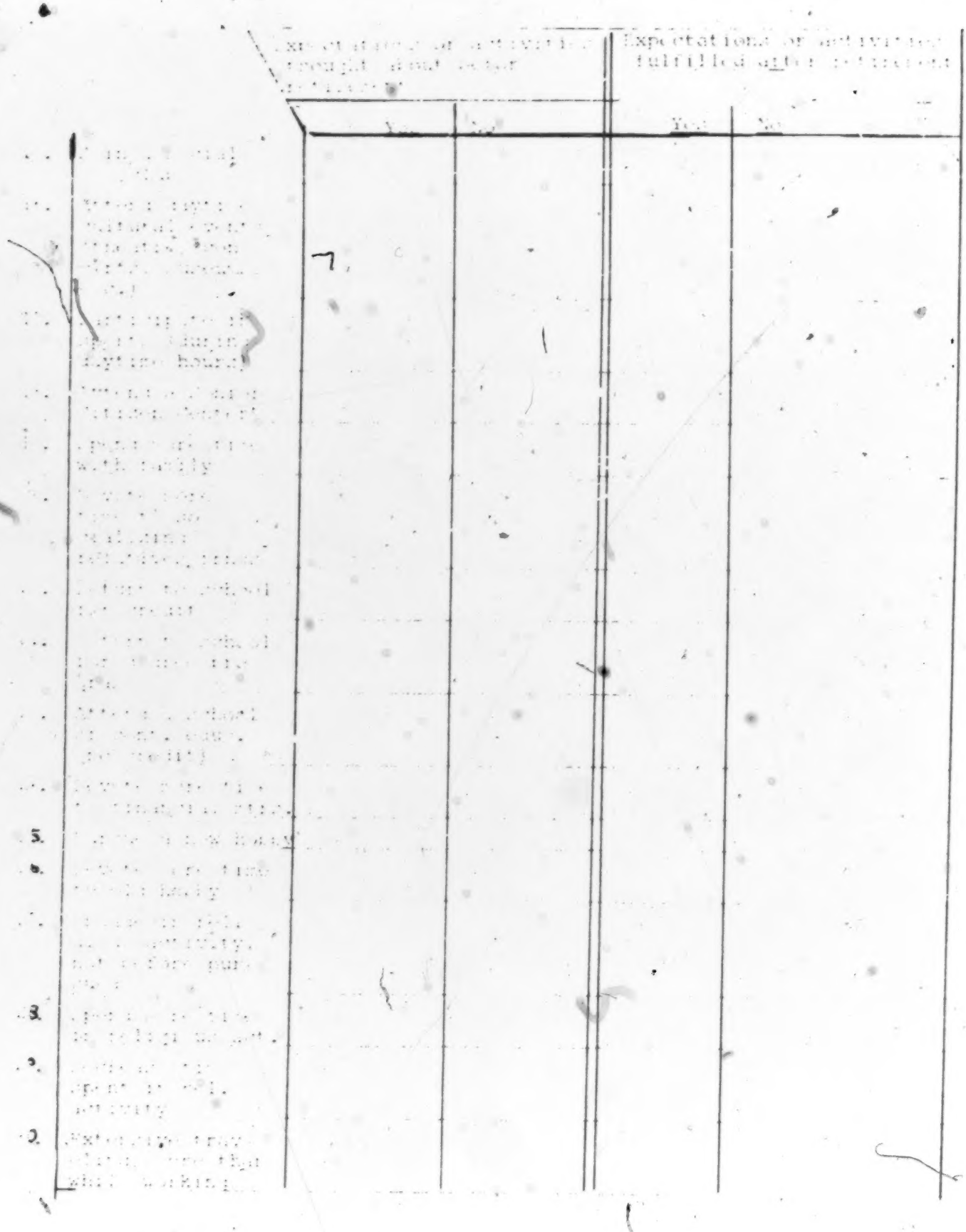
	Total	Numbers of Male	%	Numbers of Females	%
	95	27	100.	68	100.
valuable	51	18	67.	33	49.
Dubious/not sure	34	8	30.	26	38.
Not valuable	4	0	0.	4	6.
Unknown	6	1	4.	5	7

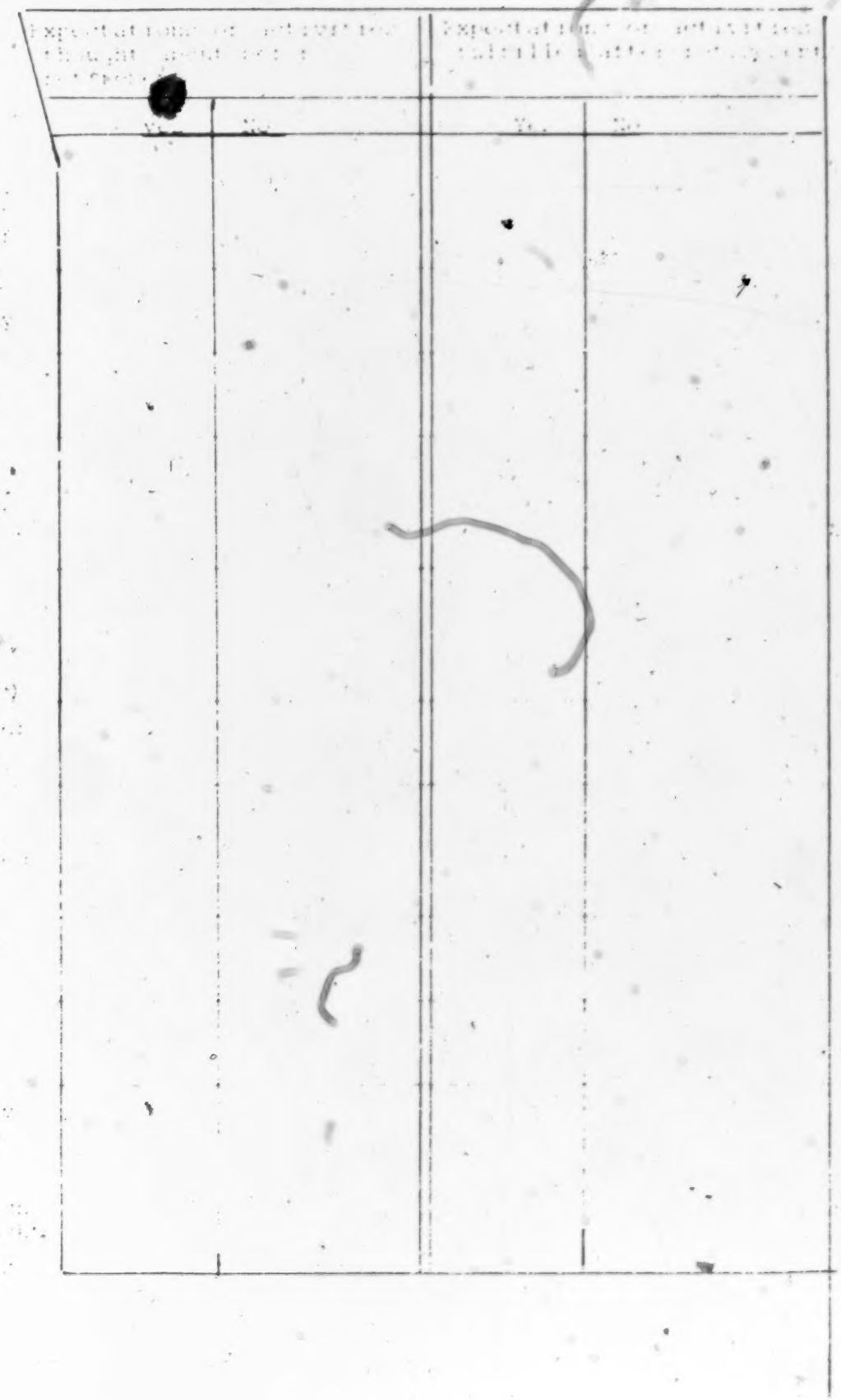
Table 9 Length of time known (while working) of retirement date.

Total	Male	Percent	Female	Percent
Total 95	27	100.	68	100.
1 year	9	33.3	14	20.5
2 years	6	22.2	2	2.9
3 years +	1	3.7	10	14.7
less than 1 yr.	1.	3.7	8	11.7
less than 6 mos.	7	25.9	25	36.7
other *	2	7.4	6	8.8
unknown	1	3.7	3	4.4

*other - Simultaneous





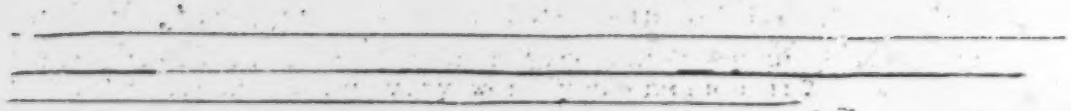


41.

Fair

a. ( ) Other: (specify)_____

(6)



How many courses equivalent with the IEP?

What were your reasons for leaving the IEP. The following are some of the reasons given by applicants. Please check those that apply to you. [illegible] IMPORTANT to all of you WHY LEAVING IEP?

[illegible] not [illegible])
[illegible] [illegible]
[illegible] program
[illegible] with friends who [illegible]
[illegible] at an educational [illegible]
[illegible] advice of [illegible]
[illegible] protect my [illegible]
[illegible] [illegible]
[illegible]
[illegible] educational [illegible] program [illegible]
[illegible] (please specify)

If the IEP were not associated with the New School or any other university would you still have joined? (That is if the program were conducted in the same manner but unaffiliated with an educational institution.) (check)

[illegible] give us your [illegible] answer)

[illegible] (check)

[illegible]

Do you have any recommendations for changes, additions, or deletions in the IEP program which would make the [illegible] examination of [illegible] valuable to you in terms of your [illegible] (check)

[illegible] (please specify)

MARCH 16